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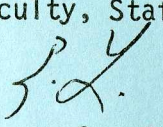
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Edwardsville Bulletin

To the Faculty, Staff and Students of Southern Illinois University at Edwardsville

Vol. 12, No. 29
April 21, 1981

MEMO TO: University Faculty, Staff, and Students
FROM: Earl Lazerson 
SUBJECT: Planning Advisory Committee Draft Report

In January, 1980 the Planning Advisory Committee (PAC) was charged to:

- "1. Define all issues which should be addressed in institutional plans.
2. Develop the planning and budgeting questions which these issues raise.
3. Establish and obtain the information necessary to respond to those questions.
4. Examine and evaluate strategies which will address the issues and which will increase the flexibility of the University in fiscal and program matters.
5. Assess the inter-relationships among such strategies; their costs and benefits and any internal or external constraints which would impact upon their implementation.
6. Propose institutional priorities relative to these strategies.
7. Make recommendations to the President regarding such strategies and the means for their attainment.
8. Establish a mechanism for continued planning including recommendations on structure, process, and calendar."

I requested that the Planning Advisory Committee, in carrying out these tasks, maintain a policy of open communication with the University community by:

- "1. Soliciting ideas and information pertinent to its work throughout the institution.

2. Continuing liaison with other parts of the institutional governance structure pertinent to the issues on which it is working.
3. Conveying interim reports, suggestions, and proposals and requesting assessments of these reports and proposals, and recommendations regarding them as appropriate."

The PAC has now arrived at a series of recommendations contained in the enclosed draft Report. It wishes to share this Report and seek your counsel.

During the Spring the PAC will hold four hearings on the Report. The first three hearings will be for faculty, staff and students, respectively, and the fourth will be open to all. During the Summer the PAC will review the record of those hearings and based on that record, revise as necessary the draft recommendations. The PAC will then report its recommendations to this office. The review conducted by the President's Office will solicit both administrative and constituency comment.

Below is a timetable for the process.

TIMETABLE

January 1980	Planning Advisory Committee charged
June 1980	Initial report by PAC transmitted by President
April 1981	Second PAC report with draft recommendations distributed to University community
April-May 1981	Hearing on Report
July-September 1981	PAC discussion of draft recommendations based on hearings PAC preparation of final report
October 1981	Transmittal of final report to President
October-December 1981	Review by institutional bodies of final report
January 1982	Result of reviews to President

Enclosures

A REPORT OF SIUE
PLANNING ADVISORY COMMITTEE

DISCUSSION DRAFT

Southern Illinois University at Edwardsville needs a planning model which details the kind of university it should become. Such a model can serve as a guide for the many critical decisions about University policies, programs, and use of resources which must be made over the next several years. This report represents an effort to provide a model and to indicate some of its implications.

The report does not attempt to resolve all the many particular issues facing the University, nor does it go into detail on what actions must be taken in order to implement the model. It attempts only to provide an overall model for the University which can serve as a framework for the more specific decisions that must be made. The resources available to this University are limited. Not everything that we would like to do can be done. The purpose of this proposed model is to set down in a general way the kind of university we see ourselves becoming. Such a model should help us to set priorities and to decide what we can and cannot do. Although some implications of the model are spelled out in this report for clarification, it is not feasible to display all of its implications here.

I. The Process Which Led to This Report

In January of 1980 the constituent Senates and the Planning and Budget Council recommended individuals to serve on a Planning Advisory Committee (PAC). President Lazerson appointed these persons and others from the administration. This Committee was to work with Jane Altes, whom he had designated Planning Coordinator for the University, to develop a long-range plan for the University. Last June an interim report of this Committee was distributed to the University community by the President.

The Committee feels that it is now ready to solicit the opinions of other members of the University community concerning its broad conclusions. This report is to inform that community of the present state of PAC thinking and to involve it in discussions before more detailed matters of policy and implementation are addressed. In addition to this report, the PAC also has made available background materials which contain the complete models and which show in greater detail its deliberations. The PAC hopes that all faculty, staff, and students will familiarize themselves with its efforts and give it the benefit of their thoughts on these topics, both by communicating with members of the Committee and by attending the meetings which will be held during Spring Quarter 1981 to discuss the report.

Although the Committee might have followed any number of approaches in its long-range planning, the method adopted consisted of a two-step process. First we constructed a list of all the issues we could think of that needed to be addressed in planning for the future. These issues were contained in the June interim report. Then we considered these issues in relation to three different models of a university based on the sources and kinds of students the University would attempt to serve in its instructional programs. The procedure was to examine in each model such issues as governance, admissions, facilities, funding programs,

faculty, staff and students, research, service, and the external environment of the University. Many matters were felt to be relevant in all models. We reviewed the issues, in each model, as to their necessity in that model, their likelihood of achievement at SIUE, and their presumed value here. We were especially interested in discovering whether the implementation of a given model would require the University to do something that we believed could not in fact be done or to do something that we believed would be harmful to the institution. The aim was to determine which of the three models could actually be realized and would be viewed as desirable if implemented.

Although the three models with which we worked were different from each other, they were all models of a university. Consequently, they all addressed the three basic tasks of any university: (a) the educating of students enrolled in the university; (b) the expansion of human knowledge (research); and (c) educational service to the community beyond the presently-enrolled student body. But each model had its own distinctive implications for each of these tasks. These three models were discussed in the June 1980 interim report of this Committee, and a brief review of them seems in order here.

One model considered was the Demand-Creative Model. A university built on this model would seek to develop exceptionally high quality academic programs designed for students with superior academic potential. Many of these students would be attracted from beyond our immediate geographic region. It would put a great deal of emphasis on research and publication by its faculty. Within such a model faculty and staff would be expected to have, or develop, national reputations for excellence.

A second model of a university considered was the Demand-Responsive Model. Such an institution would seek to adjust its programs to the immediate and possibly rapidly changing educational needs of students in its vicinity. It would expect most research to have rather immediate application to the tasks of education and service being carried out by that university in that region. Service would mean primarily service to people and communities near the university.

The third model considered is the Mixed-Demand Model. This kind of university would seek to develop certain characteristics of both of the other models. Many of its programs would be designed to meet the needs of the students of that region. But some, especially at the graduate level, would be developed with the aim of becoming such high quality programs that students who have a significant choice of which institution to attend would be attracted from within and outside the region. Faculty in these demand-creative programs would be expected to engage in that kind of research and earn those kinds of reputations typical of the demand-creative institution while in other programs the research efforts would often be applicable to the regional tasks of the university. The kind of service expected of the faculty and staff would also be related to their being associated with a demand-creative program or a demand-responsive program.

The issue implications of all three models were explored in some detail before any conclusions were drawn.

II. Basic Conclusions

The procedures focused our attention on what was feasible in our internal and external environment, and the PAC decided that SIUE should adopt the Mixed-Demand Model. In many respects this University now has demand responsive and demand creative programs, but it has not systematically addressed the implications and the limitations which must be addressed. The deliberate and conscious selection of this Mixed-Demand Model should assist us in making more enlightened decisions about University policies, programs, and use of resources in the future.

The notion of an institution designed only to respond to immediate and changing educational needs, the Demand-Responsive Model, was judged to be inappropriate for this University. Even recognizing that student needs include education for personal intellectual development and social responsibility as well as for the acquisition of marketable skills and knowledge, the University would necessarily be so committed to maintaining flexibility in its use of resources, especially faculty, that it would be extremely difficult to maintain good quality. With regard to faculty, for example, it would be necessary either to face the prospect of regular retraining so they would be able to teach in new areas, or in new disciplines, or to rely heavily on part-time faculty who would be hired as needed. The Committee agreed that it would be neither academically sound nor desirable for the University to follow this model.

The notion of an institution drawing a substantial number of its students from outside this region because of its reputation as a quality University, the Demand-Creative Model, was judged to be unrealistic for this University. The State of Illinois would not provide the resources necessary to develop such an institution, and the competition from existing institutions of higher education, both public and private, would be overwhelming. Also the model would require extensive housing, and the prospect for quickly obtaining such housing for non-regional students is not good. Such a complete break from current expectations on the part of the Illinois Board of Higher Education and others that SIUE be a regionally-oriented, low cost university would be impossible and/or inappropriate.

Consequently, the PAC selected the Mixed-Demand Model for SIUE. The adoption of this model would imply that the University should address itself to the post-secondary educational needs and demands of persons in the southwestern Illinois region while at the same time seeking to develop some particularly superior or unique programs, especially at the graduate level, that will attract students from beyond this region. In addition, the model would require assessment and support of needed student services; appropriate use of facilities; support of research and public service within predetermined guidelines and allocation of budgets appropriate to established priorities.

III. Implications of the Mixed-Demand Model

While this outline focuses primarily on the instructional and student service components of the University, all aspects of its operation would be examined, and procedures and policies developed which would support the overall institutional direction.

A. Academic Programs

A strong, rational general education program is to be maintained as a necessary part of the undergraduate experience for students in all majors. It will be designed to insure the personal intellectual development and social awareness expected of University graduates as well as to provide background knowledge for more specialized courses. A program which discourages disciplinary competition while insuring academic integrity is assumed by the PAC.

Majors offered at the University would then be of three types: (1) those which respond in an academically sound fashion to the demand generated by potential students in the southwestern Illinois region; (2) those which may also, by virtue of their exceptional quality and/or special characteristics, attract students from outside the region as well as those within it; and (3) those which are within the traditional disciplines of the arts and sciences and which, if low in enrollment, can be maintained as quality programs with only carefully limited expenditures of University resources beyond what is required for the teaching of appropriate general education and/or courses taken by those in other programs.

Increased efficiency in the use of instructional resources is critical in this institution. While appropriate individual and independent study would continue to be available, the preferred model implies the priority of courses necessary for major and minor programs and for the educational core. This model also requires that courses be offered for students interested in continuing education and the offering of courses, both credit and non-credit, away from the main campus when the need for such exists.

Continual evaluation of the academic program is essential. Demand-creative programs obviously depend on maintenance of high quality, but demand-responsive programs also require that quality be maintained. Therefore, a system must be developed not only for assessing the quality and effectiveness of programs but also for insuring that recommended changes are implemented and that resources in all parts of the institution are reallocated when necessary. The reallocation of our human resources will be assisted by the faculty-staff development program and by our current leave policies. Faculty and program excellence is expected and will be rewarded.

Criteria for the evaluation of programs would be drawn from the Model. The core education program must address the basic general education needs of the baccalaureate degree. At the same time disciplines in the traditional arts and sciences area will be encouraged to develop courses and programs outside the general studies area which relate to particular regional needs and career opportunities. They should also work with professional programs to develop courses which can be taught as joint enterprises. Programming in the professional areas will for the most part be directed toward meeting local and regional demand. The review bodies will be encouraged to carefully, but expeditiously, handle curriculum and course changes appropriate to a Mixed-Demand university.

The delivery system for academic programs should be adapted to the students for which they are designed. The location, format, and calendar for all offerings should be adjusted taking into account the needs of the students. Attention should be paid to the overall-degree requirements of students as well as to the availability of particular courses. Every effort should be made to have appropriate library, computer, and other resources available to all students of the

University. If it can be effectively and efficiently employed, television and other instructional devices should be used to assist in the education of persons in the region.

The Continuing Education program of the University should be reviewed with regard to goals, administrative structure, and reward for faculty participation. Offerings should include both job-related and self-development courses as well as avocational non-degree programs, but offerings not appropriate to a university should not be permitted. The location of continuing education activities should be determined by student demand rather than by institutional convenience.

Assessment must be made to match the use of facilities with program priorities, and a cooperative accommodation to expanding and changing needs must be attained.

B. The Student Body

Since the University exists primarily for its students, more careful attention must be given to their needs and concerns. The registration process should be made more efficient while maintaining a sensitivity to the problems of individual students. Students should be given more information about where to go for help, and those to whom they are directed should be knowledgeable and should have the authority to solve problems. Academic advisement should be mandatory, and faculty interested in providing such advisement should be encouraged and assisted in that effort. Career counseling should be available. Financial aid and placement services should be evaluated and if necessary modified to better meet the needs of students. The provision of student health services should be reviewed. The University should see that adequate social, cultural, and recreational activities are available for commuting students as well as for those who reside on campus. The budgeting of student services should be reviewed in the same manner as that of other University activities, and students should be involved in such assessment. Special efforts should be made to assist students with regard to transportation to and from the campus.

Lack of adequate housing constitutes a particularly serious problem for the University and its students. The short supply of housing not only impedes the development of demand-creative programs that would draw students from beyond the region, but it hinders the growth of demand-responsive programs and the attendance of students in this region who find commuting to campus too expensive. Housing is, and must remain, an important priority for the University. Meanwhile, existing housing should be used to maximize enrollments and to maintain the quality of the University. Consequently, priority in housing should be given to full-time students who demonstrate academic achievement.

Policies concerning admission to the University are important for the quality of the University's educational program. A substantial altering of current admissions policies would be likely to produce at least a short-term decline in enrollment and consequent loss of revenue. It is appropriate for demand-creative programs, however, and even some demand-responsive programs with more applicants than can be accommodated, to have higher admissions standards than those for the University as a whole. Such higher admission standards may further enhance the quality of these programs and eventually increase demand from an even better qualified group of applicants.

The mixed-demand institution can espouse and practice policies of open and equal access while requiring high standards of achievement for graduates. The regional

commitment involved in the Mixed-Demand Model will require that some students be provided special assistance. This activity must be done well, and in all parts of the University. There should be a clear separation of basic requisite skill attainment from the general education program by awarding only non-degree-credit for basic skill courses. There should be a clear understanding that special assistance may provide an opportunity for success but is not an easy path for the unmotivated.

With regard to student recruitment, the Mixed-Demand Model suggests policies which include an accurate and timely determination of regional needs for academic programs of the demand-responsive type combined with appropriate efforts to reach and recruit those students most likely to prefer and to profit from the more selective demand-creative programs. The University should seek to identify all of its markets, and to better its recruitment practices including those related to high schools and community colleges. It is important also for the University to communicate to the community its role in regional higher education and the ways in which the regional population benefits from the programs of SIUE.

C. Research

Support of research is a necessary part of the University. This research should be sustained by the University's own funds and by external sources. Research accomplishments reinforce the quality of programs, and excellent research faculty can create external demand for further research. External funding of research for these individuals should be expected, though some appropriated dollars should be used to assist in attracting funds from other sources. The University should be prepared to support from its own funds research which is relevant to the educational mission or to the public service mission of the University. The faculty should be encouraged to carry on research because such efforts make them better teachers and colleagues. Research adds to the fund of knowledge available to the human community and thus is an integral part of the role of a university.

D. Public Service

Public service activities constitute another part of a Mixed-Demand University's missions. It can be expected that most of the public service activities will be directed to meeting various kinds of needs in the southwestern Illinois region. Nonetheless, some faculty and staff possess reputations which permit them to respond to a demand for service in a wider community. In any case, the University should establish institutional goals and specific definitions regarding public service and should provide faculty and staff with incentives to participate in such activity.

IV. Where Do We Go From Here?

In the second paragraph of Part I, mention was made of background materials available to those who would like more details about the work of this Committee. Copies of a booklet entitled "P.A.C. Background Materials" are available for your examination in each Department Office, in each School Office, at the Lovejoy Library Reserve Desk, and in the Office of the President. Each of these booklets contains the June 5 interim report of this Committee, a record of the conclusions of the Committee with regard to the relations between the three models and the many issues felt important in planning, and an extensive summary

of the Committee discussions carried on while the implications of the various models were being explored. This material should allow a better understanding of the nature of the process carried on by the Committee and of its conclusions.

The Planning Advisory Committee will seek reaction from the University community before formulating its report to President Lazerson. In order to obtain such reactions, the President will invite faculty, staff, and students respectively to three constituency meetings during Spring Quarter of 1981. A fourth meeting will be open to all. Members of the PAC will attend these meetings in order to hear what the University has to say about our proposal and to try to answer questions about our conclusions and the reasons for them.

This Committee will then use the summer to reconsider its report in the light of various reactions to it. In the fall the Committee expects to have its final report ready for the President. That report will include a substantial amount of the detail now contained in the background documents. It will specifically outline the activities and implementation matters which would need to be addressed by other existing or appointed bodies. It will also include recommendations on how to regularize the University planning process within the governance structure of the University.

This more detailed report will be reviewed by the President and then sent, by him, for constituent body comment and recommendation. Only then will formal adoption of a plan take place.

The development of guidelines for long-range planning in the University is a very important matter, and we felt it imperative that you be involved in our first broad decisions. PAC hopes that you will give us the benefit of learning from you how we can improve our recommendations. Only then can we properly suggest the steps which will be necessary to formulate appropriate policies and implementation procedures.

Jane Altes, Chair
James Buck
Barbara DeLong
Miriam Dusenbery
Ronald Glossop
Shawn Guyot
Thomas King
Robert Koepke
James Metcalf
Randy Rock
Scully Stikes
Donald Thompson
David Werner
Mark Drucker, Ex-officio
John Reiner, Ex-officio



Office of the President /

January 17, 1980

MEMO TO: Planning Advisory Committee
FROM: Earl Lazerson *E. L.*
SUBJECT: Your Charge

In August of 1979, President Shaw requested that Ms. Jane Altes undertake the development and management of a process to implement long-range planning for the University. I supported and continue to support, both the need for this undertaking and the choice of Ms. Altes for the task.

It is imperative for the success of this effort, that there be a broadly based advisory committee reporting to the President which will undertake the planning effort and whose membership can: 1) Represent the full spectrum of University interests; 2) Approach planning from an institutional point of view; 3) Be able to remain with the job until completion; and 4) Commit the necessary time to work on planning. To secure support for this initiative, Ms. Altes met with the Chairs of the Planning and Budget Council and its sub-committees, with constituency heads, and with various University administrators. The present structure of the Planning Advisory Committee is the result.

Based on a preliminary assessment of University planning needs and of mechanisms appropriate to meet them, Ms. Altes has developed guidelines encompassing objectives and activities pertinent to the attainment of overall planning goals. I have reviewed these guidelines and now charge the Planning Advisory Committee with the following tasks:

1. Define all issues which should be addressed in institutional plans..
2. Develop the planning and budgeting questions which these issues raise.
3. Establish and obtain the information necessary to respond to these questions.
4. Examine and evaluate strategies which will address the issues and which will increase the flexibility of the University in fiscal and program matters.

5. Assess the inter-relationships among such strategies; their costs and benefits and any internal or external constraints which would impact upon their implementation.
6. Propose institutional priorities relative to these strategies.
7. Make recommendations to the President regarding such strategies and the means for their attainment.
8. Establish a mechanism for continued planning including recommendations on structure, process, and calendar.

The Planning Advisory Committee should maintain a policy of open communication with the University community by:

1. Soliciting ideas and information pertinent to its work throughout the institution.
2. Continuing liaison with other parts of the institutional governance structure pertinent to the issues on which it is working.
3. Conveying interim reports, suggestions, and proposals and requesting assessments of these reports and proposals, and recommendations regarding them as appropriate.

The need for an ongoing planning process is critical to the University. I am sure that with necessary support services from the administration you will move with all due speed on this important matter. I will meet with Ms. Altes on a regular basis, both to receive reports and to supply the committee with whatever additional information and assistance is desired. Again, I thank you for your assistance in this important undertaking.

cc: Ms. Jane Altes